One page of a document has been provided. The text content contains a disclaimer and an exclusion notice. The disclaimer states that the training manual is proprietary and confidential and may not be reproduced without prior written consent. The exclusion notice specifies that the training manual is intended solely for End-User Training and can only be reproduced for training purposes with prior written consent. The document includes copyright information and acknowledgments for updates.
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MANAGER SELF SERVICE - ABSENCE MANAGEMENT

Overview

All employees who earn leave will request time off through the Absence Management module in PeopleSoft. This applies to all types of leave: sick (with the subset of dependent sick), annual, jury, military and funeral.

An absence can be requested for an event that occurred in the past (e.g. a sick day) or for an event to occur in the future, such as annual leave. All absences should be entered by the employee, and approved by the supervisor, no later than the end of the pay period in which the absence occurs.

An absence cannot be requested for a date an employee is not scheduled to work. Basic employee schedules have been populated into the module.

Employee balances reflect the pay period of the most recent check. For example, if today is April 23; the last paycheck was April 15th, the pay period for April 15th paycheck is March 16th-31st. The leave balances would be current as of March 31st. Please contact your Human Resources/Payroll Office if you feel your balances are incorrect.

The business process under the new process is as follows:

1. An employee signs into PeopleSoft and enters a leave request before (for planned absences) or after (for unplanned absences) an event.
2. The supervisor signs into HRMS.
3. The supervisor has three choices for taking action on the request:
   a. Approve – the employee receives an approval email
   b. Deny – the employee receives a denial email
   c. Push back – the employee receives an email requesting modification of the request.

If the request is approved, it is processed in the next pay cycle.
APPROVALS TILE

Approving, Denying and Pushing Back Absence Request

Click on Approval Tile on MSS homepage to Approve submitted absence requests

Click on check box below Absence Request to Approve multiple request at one time. If you click on a absence request you will open the Absence Details page and can Approve, Deny or Pushback the request
Request History

- Click Request History link to view the transaction history for this absence request.

Approver Comments

- Enter any comments related to the approval action you take.

Approval Chain

- Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

Choose either Deny, Approve or Push Back

If you click the **Deny** button, the employee will be notified by email, and the absence request will now appear in your denied status.

If you click the **Push Back** button, the employee will be notified via email and it will be removed from your list of pending approvals.

If you click the **Approve** button, the employee will be notified by email, and the absence will now be ready for processing.

Add any comments if needed, not required.
**TEAM TIME TILE**

The Team Time tile allows you to view and submit absence requests for your employees. You can also view balances, manage exceptions and view and approve time reporting using the tasks in the Team Time tile. Select the task, then employee, and the system walks you through the steps.

**Request absence on behalf of employee**

**Request Absence**

Managers may request and absence on behalf of the employee if they are unable to do so. This is only recommended if the employee is not able to request the leave upon returning from work.

Select the employee for Request Absence
1. **Under Workflow -- under Request as -- select either Employee or Manager.**
   - **Request as: Employee (this is recommended)** - it will automatically be approved by the supervisor.
   - **Request as: Manager** – it will need to approved by the managers manager who entered the request because as a manager requesting it they also cannot approve it.

2. Click on Submit.

If you choose **Request As: Employee** the request will be submitted and approved.  
*Employee will receive an email notifying them this absence is submitted and approved on their behalf*

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**Cancel Absences**

Cancel Absences

1. Click the employee
2. Click on the absence row you want to cancel
3. In the Cancel Absence page, click Cancel Absence
4. On the Confirmation pop-up, click Yes

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**Warning**

If the absence was already approved by the manager, the manager MUST approve the cancel absence request before the absence cancelled.

If the absence was never approved by you as the manager (e.g., if was in a submitted status), your cancellation action automatically cancels the absence when the employee cancels the request

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**Warning**

Absences can be submitted, and approved, easily using mobile devices.
Absences are approved through the Approvals tile, covered in this document.
**Viewing absence request history**

View requests

Click the employee you want to view absence request history for

**Viewing an Employee’s Absence Balances**

Absence Balances

From here you can also forecast the balance for an employee. Click Forecast Balance, enter the date you want to forecast for (As of Date), and Absence Name; once this is entered the “Forecast Balance” button will appear. Click the “Forecast Balance” button. **Forecasted balance will include all leave that has been requested.**
**MY TEAM TILE**

This tile allows you to view summary information for your direct and indirect reports. The information provided in this tile includes job data, contact info, leave balances, and compensation data.

The Today's Status column will display an icon if an employee is off due to a planned absence or holiday. Access indirect reports by clicking the hyperlink in the Directs/Total column. To view Compensation or Leave information, click the tabs at the top of the page.

You can access other employee tasks by clicking the arrow next to the employee’s name.

OnBoarding Status – this will show if the employee is new and is currently onboarding, you can check status of onboarding steps and send a reminder message to your employee if necessary.
**VIEW TOTAL REWARDS**

Your team members’ Total Rewards statements are found in this tile

**VIEW MONTHLY TIME CALENDAR**

Navigate to: Manager Self Service>Time Management>View Time>Monthly Time Calendar

The Monthly Time Calendar will list all employees that report to you. You can change the month by clicking on previous month, next month or click on the drop down for month and year.

Step 1: Click on Get Employees. A list of employees will appear in the calendar below.

Step 2: From the Display Options, select items you wish to view in the calendar. (Graphic A)
Managers have the ability to delegate their approval of absence and approval of cancel of an absence to others. The person delegated to is called the proxy. Delegations can be made for a specific time frame or can be open ended.

When the delegation is submitted, the proxy will receive an email notification. The proxy must accept the delegation in order to be able to perform the task. Once accepted, the delegation remains until the end date is reached or until the delegator revokes the delegation.

**NOTE:** Once you delegate your approval of absence you will no longer be able to approve the absence.

To navigate to delegate approval absence click on Main Menu>Self Service>Manage Delegation

**Delegate Approval Absence**
To Create the Request:

1. **Select Manager Absence Approve**, or other delegate transaction as needed.
2. **Click Next** – the Select Proxy by Hierarchy page will show (see below). This page displays persons within your hierarchy that you can select as proxies. Select the radio button next to the name to select that person as a proxy. You can also select the Search by Name hyperlink to search for proxies outside your hierarchy.
3. **Click, Next and Submit.** The proxy you selected will receive an email and must go to Manage Delegation to accept the delegation.

**Once you have delegated to a proxy you no longer will be able to Approve Absence’s, your proxy or your Manager will have to approve absences for the employees who report to you.**
# Getting to Know Fluid

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🏡</td>
<td>Home button. Use to return to the default homepage, which is the fluid homepage the user was last using during the current instance on PeopleSoft.</td>
</tr>
<tr>
<td>🔍</td>
<td>Search button. Use to perform Global Search.</td>
</tr>
<tr>
<td>⚡️</td>
<td>Notifications button. Displays the notification window showing any pending actions or alerts.</td>
</tr>
<tr>
<td>📚</td>
<td>Actions List button. Use to display the actions menu based on the page you’re viewing. Allows user to add/customize home pages and the navigation bar.</td>
</tr>
</tbody>
</table>

* Indicates that the menu option will differ depending on the page the user is currently viewing.

- **Personalize Homepage** (when viewing a Homepage): Allows the user to add, remove or move tiles within their Homepage(s).

- **Add to Homepage** (when viewing a regular page): Adds a tile to the desired homepage, enabling the user to access the fluid page directly from the homepage.

- **Add to NavBar** (when viewing a regular page): Adds a shortcut to the left-hand side of the NavBar, enabling access to that fluid page directly from the NavBar.

- **Add to Favorites** (when viewing a regular page): Adds a link to the My Favorites node of the NavBar.

**My Preferences**: Modify settings that control a variety of options in the interface based on your preferences.

**Help**: Takes the user to the website that contains the UPK videos.

**Sign Out**: Signs the user out of their instance of PeopleSoft.

- 🌋 Navigation bar button (compass). Use to display the navigation bar (“NavBar”). Access additional navigational options.
The Actions List icon gives options for personalization, viewing preferences, accessing help, or signing out of PeopleSoft.

If accessing the Actions List from a page other than a homepage, there will also be additional menu items including: Add to Homepage, Add to NavBar, and Add to Favorites.

1. From the Self-Service Homepage, click the Actions List icon.
2. Select an item from the menu:
   a. Personalize Homepage – add/edit homepages or add/edit tiles on a homepage (see Personalizing Homepages for details)
   b. My Preferences – edit general settings
   c. Help
   d. Sign Out – logs user out of PeopleSoft

From a page in PeopleSoft (not the homepage), click the Actions List icon.
2. Select an item from the menu:
   a. Add to Homepage – add the current location to one of your homepages
   b. Add to NavBar – add the current page to the NavBar
   c. Add to Favorites – add the current page to Favorites can be accessed from the NavBar